



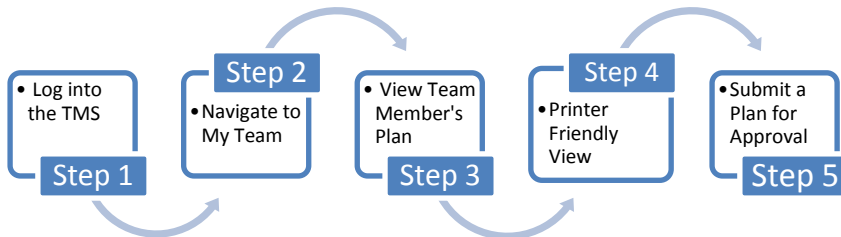
Submit Plan for Approval

ROLE: MANAGER




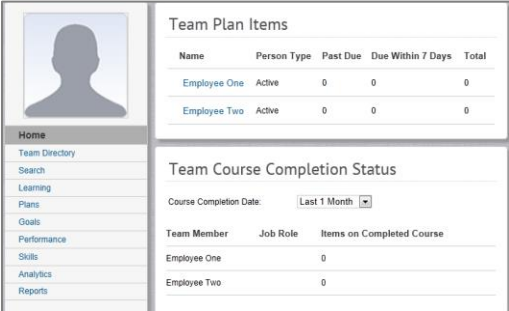
Purpose

This job aid is to guide managers through the step-by-step of how to submit a plan for approval.

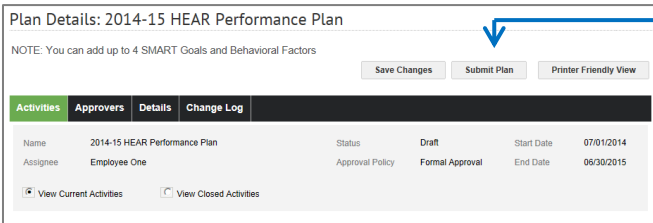
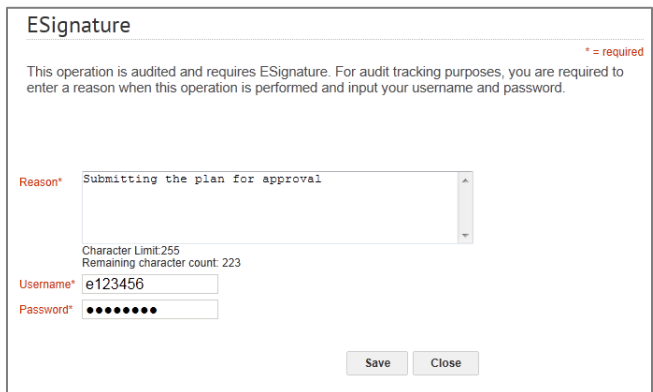
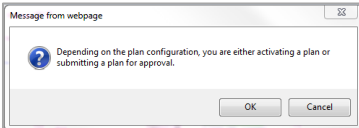
Process Flow



Procedure

Step	Action
1. Log into the Talent Management System (TMS) <div> 1. Type your Username and Password 2. Click Sign In </div>	<ul style="list-style-type: none"> From any browser, type in https://talent.houstontx.gov.  <ul style="list-style-type: none"> The Talent Management System log in screen displays. Type in your Username and Password then click Sign In.  <ul style="list-style-type: none"> The homepage displays.
2. Navigate to My Team <div> Click Plans </div>	<ul style="list-style-type: none"> Click the My Team icon in the top main header. The Team Dashboard page displays.  <ul style="list-style-type: none"> In the left navigation pane, click Plans. The Plans page displays. 

Step	Action																																										
<div>3. View Team Member's Plan</div> <div>Click the number 1 link</div> <div>Click Plan Name</div>	<div><ul style="list-style-type: none">In the Direct Team Plans, under the Draft column, click on the number 1 link next to the desired employee.<div><div>Direct Team Plans</div><table><tr><th>Person Name</th><th>Person Type</th><th>Draft</th><th>Pending App...</th><th>Pending Ack...</th><th>Activated</th><th>Completed</th><th>Cancelled</th><th>Revision Requested</th><th>Actions</th></tr><tr><td>Employee One</td><td>Active</td><td>1</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>Actions</td></tr><tr><td>Employee Two</td><td>Active</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td></td></tr></table><div>Activate PlanCreate PlanAdd ActivityReset</div></div><ul style="list-style-type: none">Under the Plan Name column, click the Plan Name that is in Draft status to view the plan details.<div><div><table><tr><th>Plan Name</th><th>Status</th><th>Start Date</th><th>End Date</th><th>Plan Type</th><th>Actions</th></tr><tr><td>2014-15 HEAR Performance Plan</td><td>Draft</td><td>07/01/2014</td><td>06/30/2015</td><td>Employee</td><td>Actions</td></tr></table><div>Add Activity to PlanActivate PlanBack to Team ViewReset</div></div></div></div>	Person Name	Person Type	Draft	Pending App...	Pending Ack...	Activated	Completed	Cancelled	Revision Requested	Actions	Employee One	Active	1	0	0	0	0	0	0	Actions	Employee Two	Active	0	0	0	0	0	0	0		Plan Name	Status	Start Date	End Date	Plan Type	Actions	2014-15 HEAR Performance Plan	Draft	07/01/2014	06/30/2015	Employee	Actions
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<div>4. Printer Friendly View</div>	<div><ul style="list-style-type: none">The Plan Details page displays. Click the Printer Friendly View button, so you can view the detailed plan.<div><div><div>Plan Details: 2014-15 HEAR Performance Plan</div><div>NOTE: You can add up to 4 SMART Goals and Behavioral Factors</div><div>Save ChangesSubmit PlanPrinter Friendly View</div><div>ActivitiesApproversDetailsChange Log</div><table><tr><td>Name</td><td>2014-15 HEAR Performance Plan</td><td>Status</td><td>Draft</td><td>Start Date</td><td>07/01/2014</td></tr><tr><td>Assignee</td><td>Employee One</td><td>Approval Policy</td><td>Formal Approval</td><td>End Date</td><td>06/30/2015</td></tr></table><div><input checked="" type="checkbox"/> View Current Activities<input type="checkbox"/> View Closed Activities</div></div></div><div>Click Printer Friendly View</div><ul style="list-style-type: none">The Printer Friendly View of Plan window appears. You can choose to print out the plan or view it on the screen. After you carefully review it, click the Close button.<div><div>Printer Friendly View of Plan</div><div><div>Plan Information</div><table><tr><td>Name</td><td>2014-15 HEAR Performance Plan</td></tr><tr><td>Assignee</td><td>Employee One</td></tr><tr><td>Plan Status</td><td>Draft</td></tr><tr><td>Start Date</td><td>07/01/2014</td></tr><tr><td>End Date</td><td>06/30/2015</td></tr><tr><td>Description:</td><td></td></tr><tr><td>Instructions</td><td></td></tr></table></div><div>Close</div></div></div>	Name	2014-15 HEAR Performance Plan	Status	Draft	Start Date	07/01/2014	Assignee	Employee One	Approval Policy	Formal Approval	End Date	06/30/2015	Name	2014-15 HEAR Performance Plan	Assignee	Employee One	Plan Status	Draft	Start Date	07/01/2014	End Date	06/30/2015	Description:		Instructions																	
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Step	Action
5. Submit the Plan for Approval	<ul style="list-style-type: none"> Click the Submit button, the plan will be routed to the Reviewing Authority (your manager) for approval.  <ul style="list-style-type: none"> The ESignature page displays. Type in a Reason for submitting the plan. Enter your Username and Password then click the Save button.  <ul style="list-style-type: none"> The confirmation dialog box displays. Click the OK button.  <ul style="list-style-type: none"> The confirmation message displays at the top. This confirms that the plan has been sent to the Reviewing Authority for approval.

END OF PROCEDURE • RETURN TO TOP